Installation/Configuration Advanced settings.

Introduction

The installation of PlanManager, as described in 'How to install planmanager?', will automatically add a number of standard configurations. This document explains what is set and how to adjust these settings. Note: this document is only used for exceptions. The standard installation procedure should normally suffice for most users.

Method for the first start of PlanManager

Enter the company name

When PlanManager is launched for the first time, the program will look in the registry to the key HKEY_CURRENT_USER \ Software \ HSS \ Core \ url. If this key does not exist, the program will ask you to enter a company name.

🚮 Company name	8 ×
Please enter your company name (For	example: insypro)
ОК	Cancel
	Carcer

After you enter a company name, the program starts with the default configuration.

Folder structure

A number of folders are created on the PC. The location of these folders are stored in the register (see below).

Мар	Function%
USERPROFILE% \ plan manager \ pictures	When you export pictures, they are
	placed in this folder.
% USERPROFILE% \ plan manager \ PDF	If you want to print a document, the PDF
	file is placed in this folder.
% USERPROFILE% \ plan manager \ watch	Audatex writes his sysou files in this
	folder path. The program looks at the
	map, as capacity is added a new file the
	latest file is uploaded to PlanManager.

Registry

The following keys are in the registry under the folder HKEY_CURRENT_USER \ Software \ HSS \ Core:

Note: The% USERPROFILE% and% APPDATA% are shortcuts that Windows can use to go to a particular folder. The% USERPROFILE% will refer for example to C: \ Users \ Tom. It is that path (for example, C: \ Users \ Tom \ plan manager \ pictures) that you should use in this case.

Key Version	Default 20150219	Meaning This is becoming the version number of the Core
doc_folder%	USERPROFILE% \ plan manager \ pictures	when you export pictures they are placed in this folder.
dowload_folder%	USERPROFILE% \ plan manager \ PDF	If you want to print a document, the PDF file in this folder.
doc_storage	Temporary	From version 20130723 this configuration is no longer used.
informex_jar_path%	APPDATA% \ Informex \ apps \ launcher \ CurrentVersion \ Winform-	The location of the jar file location which is used by planmanager to inject files
winbooks_path	Injector.jar	The folder in which the invoice files WinBooks should be placed.
url	http: //yourcompany.planm anager.insypro.com	yourcompany is the company name that you entered. This URL will be open at startup.
close_callback	http: //yourcompany.planm anager.insypro.com	When the program is closed one last request is send to this page to unblock all open files.
proxy		If you work with a proxy server your insert your proxy as: hostname:8800
Proxy_User		If you use a proxy server which requires registration, you may enter the username,
proxy_pass		And the password of the proxy.
window_title watch_folder%	Plan Manager USERPROFILE% \ plan Page 2 / 7	The title of the program Audatex writes his sysou

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URL: http://faq.insypro.com/index.php?action=artikel&cat=4&id=479&artlang=en

accounting_path yourcompanyname.user	manager \ watch	files in this folder path. The program looks at the map, as a new file is added the latest file is uploaded to plan manager. Here, the accounting files are written. This will store your username to be able to communicate with Audatex. This password is stored
yourcompanyname.pass length		This password is stored temporarily in order to make communication with Audatex. This temporary stores the
		language in PlanManager.

Winformex

Also, important to know is that PlanManager will try to configure Audatex, so it immediately works with PlanManager.

The following files are copied:

From APPDATA% \ Informex \ apps \W2-PROD\ current \ Winform APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save-directory single.xml.old%APPDATA% \ Informex \ Winform \ conf \ sysou- copy-save-	To% Injector.jar%APPDATA% \ Informex \ apps \Launcher\ current \ WinformInjector.jar% single.xml%APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save- directory multi.xml%APPDATA% \ Informex \ Winform \ conf \ sysou-copy-save-
Winform \ conf \ sysou- copy-save-	Winform \ conf \ sysou-copy-save-
directory	directory multi.xml.old

The location of the Winform Injector file is stored in the setting informex_jar_path.

The files sysou-copy-save-directory multi.xml and sysou-copy-save-directory single.xml are used by Audatex to store the files.

This setting watch_folder, which state, will therefore be entered in the register files sysou-copy-save-directory multi.xml and sysou-copy-save-directory single.xml. If

you change the Audatex setting itself, keep in mind that even the registry setting watch_folder must be adjusted.

Proxy

If you are using a proxy server in your company, you must manually register the setting proxy entering the form hostname: 8080.

Remote Desktop / Terminal Server / Citrix

Remember that PlanManager writes settings under HKEY_CURRENT_USER. If you have multiple users working on the same server then each user will be configured.

Note: because the Audatex configuration is stored globally for all users in the file 'sysou-copy-save-directory multi.xml' you can define only one folder to use. However, this creates another problem. Take the following use case:

Winformex sysou-copy-save directory and plan manager watch_folder are both set to C: \ watch.

Three users Tom, Dick, George and Corneel. They all have their open PlanManager.

John has just made a Winformex estimation and allows transmission to Informex.

Winformex sysou writes the file path C: \ Watch

The PlanManager of John sees the change of the directory and sends the sysou file.

But the PlanManagers of Peter George and Corneel see the change and send the same file.

The file is thus three times sent to the server.

But here's a simple solution:

Configure watch_folder and sysou-copy-save directory as H: \ plan manager \ watch where H: is a network that is unique for each user. A good example is the HOME directory on many terminal servers. Each user has an H but can only see their own files.

For Informex seems as if all the files can be written to the same folder. But the PlanManager of John only sees his own sysou files and not from Peter George or Corneel.

Automatically sign

You can set PlanManager so that you are automatically logged. This can be useful for instance for ATR users.

Here's how:

Go to System -> Local Settings -> Open local configuration

	_	▲ Back													💄 Jean-i
Plan Manag	ger	General settings	Customized settings	Lists	Usergroups	Log	Vault	Security	Credits	Survey	Archive				
COMMUNICATION	ı 👧	Version: 20180214													
HELP	?	Check for updates	Open local config												
WORKSHOP	C			[Setting:	s						?	×		
					Base Url*	https://DE	MO.planman	ager.insypro.com	n						
јов	È				Proxy										
					Proxy user										
PLANNING	•••				Proxy pass										
DEDODT	B AL				Documents Folder*	C:\Users	s\jmsol\planr	nanager\fotos				Choose	folder		
REPORT					PDF Folder*	C:\Users	s\jmsol\planr	nanager\pdf				Choose	folder		
MAINTENANCE	ىر				Accounting Folder							Choose	folder		
	Ĩ				Third party folder							Choose	folder		
SYSTEM	ŧ				Zoom										
					Use Informex										
RENTAL	60				Reload Settings										
	_				Jar Script:										
INVOICING	(0)				watch Folder:										
											Save	Can	cel		
				l											

Enter the Base URL existing with:

http://companyname.planmanager.insypro.com/index.php?pass=je & user password = your username

Then press Save.

Installing Multiple PlanManagers

If you need to work with multiple PlanManagers, for example, your own business, but also have to access the PlanManager of another company because you do repairs for them, then you can work in the following manner to use multiple PlanManagers.

Computer	r 🕨 Local Disk (C:) 🕨 Program Files 🕨 Insypro	> ▶		▼ ♦ Search Ins	ypro	Q
Organize 🔻 🛛 🛜 Open	Include in library 👻 Share with 👻	New folder			•== •	
🔆 Favorites	Name	Date modified	Туре	Size		
Nesktop	\mu Planmanager	24/06/2015 15:19	File folder			
 Downloads Recent Places Libraries Documents Music Pictures Videos 	Copy to Insypro					
🗣 Network						

After installing Schedule Manager, you can go to the location on your computer where you have installed it.

By default this is C: $\ Program Files (x86) \ Insypto or C: \ Program Files \ Insypto. Here you will see a folder PlanManager. If you drag the folder with Ctrl you can create a copy of this folder to the same location.$

	r billesel Dick (Cr) billes	ram Files + Jasur			- fr Coarsh lasuran	
		gram Files 🖡 Insyp			• • search insypto	~
Organize 🔻 🗦 Open	Include in library 🔻	Share with 🔻	New folder			
☆ Favorites	Name		Date modified	Туре	Size	
🧮 Desktop	퉬 Planmanager		24/06/2015 15:19	File folder		
🗼 Downloads	🗼 tweede locatie		24/06/2015 15:21	File folder		
🔚 Recent Places						
📜 Libraries						
Documents						
🌙 Music						
Pictures						
Videos						
🖳 Computer						
🗣 Network						

You can rename the folder to the second company.

ز Libraries	hashlib.pyd	12/06/2011 16:06	PYD File		View	•
Documents	🚳 7z.dll	18/11/2010 21:27	Application extens		Sort by	+
🌙 Music	Tz.exe	18/11/2010 21:08	Application		Group by	•
Pictures	7zipLicense.txt	2/01/2010 15:18	Text Document		Refresh	
🛃 Videos	📓 autorun_watcher.ps1	27/02/2015 10:02	PS1 File		Contraction (12) (11)	
	bz2.pyd	12/06/2011 16:06	PYD File		Customize this folder	
🖳 Computer	📄 changelog.txt	24/06/2015 14:08	Text Document		Paste	
	🚳 debugmode _watcher.bat	9/02/2015 12:16	Windows Batch File		Paste shortcut	
📬 Network	🚳 debugmode.bat	16/11/2012 18:28	Windows Batch File		Undo Rename	Ctrl+Z
	en.qm	5/01/2015 17:13	QM File		Chang with	
	ETOS_manual.pdf	2/12/2014 10:01	Firefox HTML Doc		Share with	
	ETOS_Planmanager.exe	15/05/20: 퉬 Folder			New	•
	📄 fr.qm	10/03/201 💽 Shorte	ut		Properties	
	😋 help.exe	26/07/20:	image	201 1	v v	
	🚳 icudt53.dll	16/10/201 Contac	-+	061 K	KB	
	🚳 icuin53.dll	16/10/201	LD a sum ant	571 K	KB	
	🚳 icuuc53.dll	16/10/201 🔤 Journa	n Document	045 K	KB	
	kleinmateriaal.exe	15/05/201 Rich Te	ext Document	104 K	KB	
	🔊 libeay32.dll	6/08/2014 Text De	ocument	150 k	KB	
	libaccis dw2-1 dll	23/10/20 🔡 Compi	ressed (zipped) Folder	118 k	(R	

In both of these directories, you must create a config.ini file by clicking the right mouse button and then new - to select text file. The file is then created 'file.txt' to rename 'config.ini'. NOTE: Windows hides file extensions by default so you can not see the .txt and if you rename the file, the file names actually config.ini.txt. You will have to display file extensions for that folder to get back off the .txt.

config.ini	9/12/2015 9:56	Configuration sett	6 KB	
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The text in this section can then be changed. It starts with [defaults] followed by all the settings you need for this PlanManager. All settings can be found here above in the "Register" section. You can fill it here as follows: "key = value". For example, "url = http://yourcompany.planmanager.insypro.com '.

If you want to update PlanManager's installation to the latest version, after the update, you will need to copy all files except the config.ini contained in the PlanManager folder that we copied to the new folder.

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